

VII. Policies and Procedures Governing Quarterly Reviews

The agency shall review and document the client's situation and service plan at least quarterly from the date of application except for clients whose only service(s) is (are):

transportation; <http://www.ncdhhs.gov/aging/transp.htm>

child care; <http://ncchildcare.dhhs.state.nc.us/general/home.asp>

foster care; <http://www.ncdhhs.gov/dss/fostercare/index.htm>

adoptions; and <http://info.dhhs.state.nc.us/olm/manuals/dss/csm-50/man/>

housing and home improvement <http://www.dhhs.state.nc.us/aging/services/himprove.htm>

The agency shall conduct the review in the month it is due. The month the quarterly review is due is determined by the month in which the application was made.

The agency must label and date the quarterly review in the record.

[10A NCAC 71R .0606]

An annual re-assessment may take the place of the fourth quarterly review at the end of each twelve months of service provision.

The quarterly review includes an assessment of the client's progress since the last review, need for continued service or additional services and any significant changes in the client's situation/functional domains.

If possible, the review should be done with a face-to-face visit with the client.

If a face-to-face visit is not possible, collateral sources knowledgeable of the client's situation may be contacted to complete the quarterly review. Documentation should indicate the reasons the review was not done with the client.

The quarterly review is a minimum requirement. Reviews may occur more frequently than quarterly if needed.